

Malibu Commerce

M-Connect

Dynamics 365 Business Central

Documentation

NAV Setup
3

A. Setup Web Services
3

B. Publish MC Code unit
3

Note: code unit object ID may differ from ID shown in the picture below:
3

C. Initiate change log.....
3

This is something a BC partner should do in a live environment.
3

D. MC Webshop Setup table
3

Used to set defaults upon customer and order creation per E-Commerce store.
3

E. Setup WSHOPDOC Number Series in No. Series Table.....
5

Setup Security Roles.....
5

Payment Method Mapping
7

A. Allows mapping of E-Commerce payment methods to the correct corresponding BC payment method.....
7

Shipping Agent/Service Mapping
8

A. Allows mapping of E-Commerce shipping agent/service methods to the correct corresponding BC agent/service method
8

Outbound Documents
11

Inbound Documents
12

Sync Processes - BC
12

NAV Setup

A. Setup Web Services

1. Standard web services setup applies per NAV/IT structure
2. Set NTLM Authentication to True on the NAV instance
3. Install HTTP certificate for SSL encryption

B. Publish MC Code unit

Note: code unit object ID may differ from ID shown in the picture below:

Object Type	Object ID	Object Name	Service Name T	All Tena...	Publ...	OData V4 URL	OData URL	SOAP URL
Codeunit	70195825	MAL Web Service	MalibuV2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not applicable	Not applicable	https://demo.malibucommerce.c...
Codeunit	1544	Workflow Webhook Subscription	WorkflowActionResponse	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not applicable	Not applicable	https://demo.malibucommerce.c...
Page	1314	AccountantPortal Activity Cues	AccountantPortalActivityCues	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://MALIBU-AZ-017048/BC1...	https://MALIBU-AZ-017048/BC1...	https://demo.malibucommerce.c...
Page	1315	Accountant Portal Finance Cues	AccountantPortalFinanceCues	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://MALIBU-AZ-017048/BC1...	https://MALIBU-AZ-017048/BC1...	https://demo.malibucommerce.c...
Page	1316	Accountant Portal Hour Tasks	AccountantPortalHourTasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://MALIBU-L127-017048/BC1...	https://MALIBU-L127-017048/BC1...	https://demo.malibucommerce.c...

C. Initiate change log

This is something a BC partner should do in a live environment.

D. MC Webshop Setup table

Used to set defaults upon customer and order creation per E-Commerce store.

1. **Store No.**
 - a. The store No. needs to correspond with the Store ID in E-Commerce
2. **Description**
 - a. User defined description of the E-Commerce store
3. **Shipping Fee Type**
 - a. Select either G/L Account or Resource for freight charged on the web
4. **Shipping Fee No.**
 - a. Select the account to apply the freight charge to
5. **Guest Customer No.**
 - a. Select the BC customer card which will be used for all guest customer sales orders

6. Sales Order Nos.

- a. Select the Sales order number series for orders created from E-Commerce

7. Customer Nos.

- a. Select the Customer number series for new customers created from E-Commerce

8. Sync Contacts

- a. Check this box to sync contacts from BC to E-Commerce

9. Order Discount Account No.

- a. Select the G/L account that will be used to apply E-Commerce discounts

10. Sales Rep Customer Group

- a. Used if the additional sales rep extension is utilized

11. E-Commerce URL

- a. The URL for the E-Commerce admin environment
- b. Used for instantly creating items from BC to E-Commerce

12. E-Commerce Key

- a. This is the trigger password set in E-Commerce (See E-Commerce Setup section below)

13. Customer Posting Group

- a. Used to set the default Customer posting group upon new customer creation

14. Customer Gen. Bus. Posting Group

- a. Used to set the default Customer Gen. Bus. Posting Group upon new customer creation

15. Customer Payment Terms

- a. Used to set the default Customer Payment Terms upon new customer creation

16. Customer Payment Method

- a. Used to set the default Customer Payment Method upon new customer creation

17. Default Customer Location code

- a. Used to set the default Customer Location Code upon new customer creation

18. Tax G/L Account No.

- a. Select the G/L account that will be used to apply order tax

19. Auto Create Ship-to

- a. If checked, new ship-to address cards will be created upon order creation when a new shipping address is created in E-Commerce

Store No. 1	Description	Shipping Fee Type	Shipping Fee No.	Guest Customer No.	Sales Order No.	Sales Credit Memo No.	Customer Nos.	Sync Con.	Order Discount Account No.	Sales Rep Customer Group	Magento URL	Magento Key
1	Webstore	GL Account	45100	01121212	S-ORD-1	S-CR	CUST	<input type="checkbox"/>	45100			
2	Webstore	GL Account	45100	01121212	S-ORD-1	S-CR	CUST	<input type="checkbox"/>	45100			

E. Setup WSHOPDOC Number Series in No. Series Table

1. This is used to assign the number series for the inbound/outbound documents.
2. The Starting and Ending no's can be user defined
3. The Code must be WSHOPDOC

Setup Security Roles

A. Create new MCONNECT user and Add Table Data to BASIC Role:

Permission Set T	Name	Type T	Extension Name
AMCBANKING365FUND...	AmcBanking365Fundamentals Perm	Extension	AMC Banking 365 Fundamentals
DIOT - LOCALIZATION	DIOT - Localization for Mexico	Extension	DIOT - Localization for Mexico
ESSENTIALBUSINESSHEA	Essential Business Headlines	Extension	Essential Business Headlines
IMAGE ANALYZER	Image Analyzer	Extension	Image Analyzer
INTELLIGENTCLOUDBASE	Intelligent Cloud Base	Extension	Intelligent Cloud Base
INTELLIGENTCLOUDBC	Intelligent Cloud Business Cen	Extension	Business Central Intelligent Cloud
LATE PAYMENT PREDICT	Late payment prediction	Extension	Late Payment Prediction
MCONNECT	M-Connect	Extension	Malibu Connector
PAYPALSTANDARD	PayPalStandard Permissions	Extension	PayPal Payments Standard
PAYPALSTANDARDREAD	PayPalStandard Read Permission	Extension	PayPal Payments Standard
SALESANDINVENTORYFOR	Sales And Inventory Forecast	Extension	Sales and Inventory Forecast
SENDEMAILPRINTXTE	SendToEmailPrintExtension Perm	Extension	Send To Email Printer
ADCS ALL	ADCS User	System	
ADCS SETUP	ADCS Set-up	System	
BANKDEC-EDIT	Edit Bank Recs	System	
BANKDEPOSIT-EDIT	Edit Bank Deposits	System	
BANKDEPOSIT-POST	Post Bank Deposits	System	
BANKDEPOSIT-POSTED	Read Posted Bank Deposits	System	
BANKREC-POST	Post Bank Recs	System	
BANKREC-POSTED	Read Posted Bank Recs	System	

System Permissions

Object Type	Object ID	Object Name
(There is nothing to show in this view)		

Tenant Permissions

Object Type	Object ID	Object Name
Table Data	50015	
Table Data	50016	
Table Data	50017	
Table Data	50018	
Table Data	50019	

B. Add Table Data to new MCONNECT Role:

Amics 365 Business Central

PERMISSION SETS | WORK DATE: 1/27/2022

PERMISSIONS | WORK DATE: 1/27/2022

Permission Set 1

- AMCBANKING365FUNDA...
- DIOT - LOCALIZATION
- ESSENTIALBUSINESSHEA
- IMAGE ANALYZER
- INTELLIGENTCLOUDBASE
- INTELLIGENTCLOUDBC
- LATE PAYMENT PREDICT
- MCONNECT
- PAYPALSTANDARD
- PAYPALSTANDARDREAD
- SALESANDINVENTORYFOR
- SENDOEMAILPRINTEXTE
- ADCS ALL
- ADCS SETUP
- BANKDEC-EDIT
- BANKDEPOSIT-EDIT
- BANKDEPOSIT-POST
- BANKDEPOSIT-POSTED
- BANKREC-POST
- BANKREC-POSTED
- BANKSTAMNT-SERVICE

General

Permission Set MCONNECT

Object Type	Object ID	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission
Table Data	50015		Yes	Yes	Yes	Yes
Table Data	50016		Yes	Yes	Yes	Yes
Table Data	50017		Yes	Yes	Yes	Yes
Table Data	50018		Yes	Yes	Yes	Yes
Table Data	50019		Yes	Yes	Yes	Yes
Table Data	50020		Yes	Yes	Yes	Yes
Table Data	50021		Yes	Yes	Yes	Yes
Table Data	50022		Yes	Yes	Yes	Yes
Table Data	50023		Yes	Yes	Yes	Yes
Table	50015					
Table	50016					
Table	50017					
Table	50018					
Table	50019					

Payment Method Mapping

A. Allows mapping of E-Commerce payment methods to the correct corresponding BC payment method

- Note:** The web payment method is the payment method that will be sent over from E-Commerce. This does not necessarily correlate with the front-end payment method description. The simplest way of figuring this out is to send over an order with each payment method, see what E-Commerce sends over, and map accordingly

Amics 365 Business Central

PAYMENT METHODS | WORK DATE: 1/27/2022

Code # Description Bal. Account Type Bal. Account No. Direct Debit Direct Debit Pmt. Terms Code Int. Export Line Definition Bank Int. Type S/R Method of Payment Use for Invo. Web Payment Method

ACCOUNT	Payment on account	G/L Account		<input type="checkbox"/>							<input checked="" type="checkbox"/>	checkmo
BANK	Bank transfer	G/L Account		<input type="checkbox"/>							<input checked="" type="checkbox"/>	
BNKCONVDO...	Bank Data Conversion for Domestic...	G/L Account		<input type="checkbox"/>							<input type="checkbox"/>	
BNKCONVINT	Bank Data Conversion for internati...	G/L Account		<input type="checkbox"/>							<input type="checkbox"/>	
→ CARD	Card payment	G/L Account		<input type="checkbox"/>							<input checked="" type="checkbox"/>	credit card
CASH	Cash payment	G/L Account	11200	<input type="checkbox"/>							<input checked="" type="checkbox"/>	
CHECK	Check payment	G/L Account		<input type="checkbox"/>							<input checked="" type="checkbox"/>	
CHECKMO		G/L Account		<input type="checkbox"/>							<input type="checkbox"/>	
GIRO	Giro transfer	Bank Account	GIRO	<input type="checkbox"/>							<input type="checkbox"/>	
INTERCOM	Intercompany payment	G/L Account		<input type="checkbox"/>							<input type="checkbox"/>	
MULTIPLE	Multiple payment methods	G/L Account		<input type="checkbox"/>							<input checked="" type="checkbox"/>	
PAYPAL	PayPal payment	G/L Account		<input type="checkbox"/>							<input checked="" type="checkbox"/>	

Shipping Agent/Service Mapping

A. Allows mapping of E-Commerce shipping agent/service methods to the correct corresponding BC agent/service method

1. **Note:** The web shipment method is the shipment method that will be sent over from E-Commerce. This does not necessarily correlate with the front-end shipment method description. The simplest way of figuring this out is to send over an order with each shipment method (including service), see what E-Commerce sends over, and map accordingly

2.

Code *	Name	Internet Address	Web Shipping Agent
DHL	DHL Systems, Inc.	www.dhl.com/track/track.post-track?awb=%1&origin=United Kingd...	
FEDEX	Federal Express Corporation	www.fedex.com/cgi-bin/track_t1?trk_num=%1&dest_centry=%2&ship...	
FLATRATE	own		flatrate
OWN LOG.	Own Logistics		
→ LIPS	United Parcel Service of America, Inc	www.ups.com/tracking/tracking.cgi?tracknum=%1	UPS

B. Mass web enable Customers/Items

1. Run this report to web enable a group of Items or Customers

The screenshot displays the Dynamics 365 Business Central interface for 'GRONUS USA, Inc.'. The main dashboard shows a 'Good morning!' headline and several activity cards: 'SALES QUOTES - OPEN' with a count of 0, 'SALES ORDERS - OPEN' with a count of 21, and 'SALES ORDERS RELEASED NOT SHIPPED' with three sub-cards: 'READY TO SHIP' (6), 'PARTIALLY SHIPPED' (0), and 'DELAYED' (14). An 'ASSIGN ITEMS TO WEB SHOP' dialog box is open on the right side of the screen. The dialog box contains the following fields and options:

- Web Shop Code: [Dropdown]
- Create For: [Dropdown, set to 'Item']
- Filter: Item
- × No.: [Dropdown]
- + Filter...
- Filter totals by:
- × Variant Filter: [Dropdown]
- + Filter...
- Filter: Customer
- × No.: [Dropdown]
- + Filter...
- Filter totals by:
- + Filter...
- Buttons: Schedule..., OK, Cancel

C. Mass initiate re-sync of all Customers, Items, Sales Prices, Inventory

1. Data in BC will re-sync if something changes. Sometimes a mass sync needs to be initiated even if nothing specific has changed. Run this report to accomplish this.
 - a. Note: A re-sync of all data can be time consuming depending on the amount of data.

INIT TABLE CHANGE LOG

Export

Customers

Items

Sales Orders

Inventory

Contacts

Sales Prices

Sales Line Discounts

Date/Time Stamp

Schedule... OK Cancel

Outbound Documents

A. Tracks all the data and processes that have been sent from BC to E-Commerce.

← OUTBOUND DOCUMENTS | WORK DATE: 1/27/2022 🔖 📄 ↗

🔍 Search + New Manage 📄 Open in Excel 🔍 ☰

No. ↑	Method	Created Date/Time	Processed Date/Time	Status	Record Count
WS0001	customer_export	11/12/2020 2:14 PM		Processed	1
WS0002	customer_export	11/12/2020 2:15 PM		Processed	0
WS0003	inventory_export	11/12/2020 2:15 PM		Processed	0
WS0004	shipment_export	11/12/2020 2:15 PM		Processed	0
WS0005	promo_export	11/12/2020 2:19 PM		Processed	0
WS0006	customer_export	11/12/2020 2:20 PM		Processed	0
WS0007	item_export	11/12/2020 2:20 PM		Processed	1
WS0008	inventory_export	11/12/2020 2:20 PM		Processed	0
WS0009	invoice_export	11/12/2020 2:20 PM		Processed	0
WS0010	shipment_export	11/12/2020 2:20 PM		Processed	0
WS0011	customer_export	11/12/2020 2:25 PM		Processed	0

Inbound Documents

A. Tracks all the data and processes that have been sent from E-Commerce to BC.

B. List view will show processes and errors

No.	Method	Created Date/Time	Processed Date/Time	Status	Record Count
WS11232	customer_import	11/19/2020 1:59 PM	11/19/2020 1:59 PM	Processed	1
WS11233	sales_order_import	11/19/2020 1:59 PM	11/19/2020 2:51 PM	Error	1
WS11240	sales_order_import	11/19/2020 2:00 PM	11/19/2020 2:00 PM	Error	1

1. To resolve errors:
 - a. Open the process with the error by double clicking on the line
 - b. Click “View errors” to see the error
 - c. Resolve the error as appropriate
 - d. Once resolved, click “Reprocess” to allow the order/customer to be created

INBOUND DOCUMENT | WORK DATE: 1/27/2022

WS11329 · sales_order_import

Process Related | Navigate | Fewer options

General

No.	WS11329	Processed Date/Time	11/19/2020 3:00 PM
Method	sales_order_import	Status	Error
Created Date/Time	11/19/2020 3:00 PM	Record Count	1

Request Document

Records

Record	Key Value	N/W Document No.
(There is nothing to show in this view)		

Fields

Name	Value
Order	
nav_customer_id	C00220
mag_order_id	200000054
mag_customer_id	66
email address	harrv@mailbucommerce.com

Sync Processes - BC

A. Item Card

1. Sync a product to E-Commerce
 - a. On Ecommerce tab – check web enabled
 - b. Select which E-Commerce website the product should sync to
2. To re-sync the same product

- a. Make a change to the item to re-trigger the same product to sync

B. Customer Card

3. Sync a Customer to E-Commerce
 - a. On Ecommerce tab – check web enabled
 - b. Select which E-Commerce website the customer should sync to
 - c. Note: The customer must have a unique email address to be created in E-Commerce
4. To re-sync the same customer
 - a. Make a change to the customer to re-trigger the same product to sync

C. Sales Order

5. Ecommerce tab
 - a. An order synced from E-Commerce will have Created by WS checked
 - b. The E-Commerce order number will be displayed

D. Shipment

6. When an E-Commerce order is synced from BC, the item no., qty., tracking number, and carrier information are sent back to E-Commerce
7. A shipment is created in E-Commerce with the details provided
8. If standard E-Commerce functionality is used for credit cards:
 - a. The credit card will be captured for the amount that was shipped
 - b. A E-Commerce invoice is also created
 - c. If the order shipped complete, the E-Commerce order status will be marked complete
 - d. If the order partially shipped, the remaining quantity would remain open until shipped complete

E. Invoice

9. If the order has payment terms:
 - a. When the invoice is created in BC, and invoice will be created in E-Commerce for the quantity invoiced
 - b. If the order shipped/invoiced complete, the E-Commerce order status will be marked complete

F. Customer Specific Pricing

10. The Sales price table is synchronized to E-Commerce
11. In E-Commerce, the prices are adjusted to match BC price calculation based on customer price group and specific price for a specific item/customer combination. This will also take into account the start/end date specified in the BC table

G. Inventory

12. Standard functionality will sync Qty. on Hand from BC to E-Commerce
13. It will sync changes to the Item ledger entry table